

Checklist: Diagnosed With A Serious Illness

Getting Started

Whether it's for yourself or someone you love, use this checklist to help you get some important planning out of the way.

Here are the things we cover:

- Medical Decisions: Advance Directive, DNR, and POLST
- Location of Legal Documents & Official Identification
- Financial & Insurance Info
- Utilities & Digital Accounts
- General Funeral & Legacy Wishes

Remember

[Create an Everplan](#) to easily and securely update and share this vital info with the people you love and trust.

ADVANCE DIRECTIVE

Your Advance Directive is comprised of two parts. Your **Living Will** outlines what kind of life-support treatment you *want* or *don't want* at the end of life; your **Health Care Proxy** will be the one to make medical decisions on your behalf should you no longer be able to make them on your own.

I have a completed my state's official Advance Directive form

Living Will

Health Care Proxy

Location of Advance Directive: _____

I need to fill out my state's Advance Directive form [[State-by-State Advance Directive Forms](#)]

DO NOT RESUSCITATE (DNR) ORDER

A **DNR** order is separate from a Living Will -- even if your Living Will states that you do not want life-support treatments. If you'd like to create a DNR, you'll need to meet with your doctor to complete the forms.

I have met with my doctor and obtained an official, completed DNR

Location of DNR: _____

I need to meet with my doctor to obtain my DNR

I **don't** want a DNR

POLST (PHYSICIANS ORDERS FOR LIFE SUSTAINING TREATMENT)

This is a legal document for people with advanced progressive illnesses that specifies the type of care they would like in an emergency medical situation; it also goes by: MOST, MOLST, POST and TPOPP.

Find out if my state offers a POLST or a similar form: [State-By-State POLST Forms](#)

I have met with my doctor and obtained an official, completed POLST form

Location of POLST: _____

I need to meet with my doctor to obtain my POLST

I **don't** want a POLST

LEGAL DOCUMENTS

Will

Executor: _____

Official document location: _____

Power Of Attorney

Person Named: _____

Official document location: _____

IDENTIFICATION / VITAL DOCUMENTS

Share the location of the following forms of ID.

Birth Certificate

Driver's License

Social Security Card

Armed Forces ID / Discharge Papers

Passport

Citizenship Documentation

Marriage Certificate

Divorce Decree / Settlement Info

Other (Example: Club Memberships, State ID card):

FINANCIAL ACCOUNTS

Have a recent account statement for each, location of related items (example: checkbooks, passbooks), and online management info (account/login and password).

Checking

Savings

Credit Cards

Investments

Trusts

Mortgage/Loan Info

Other (Example: Debit Card, Promissory Note):

INSURANCE INFO

Share the location of related items (example: Official policy, ID card), and online management info (account/login and password).

<input type="checkbox"/> Life Insurance	<input type="checkbox"/> Health Insurance	<input type="checkbox"/> Car Insurance
<input type="checkbox"/> Home Insurance	<input type="checkbox"/> Renters Insurance	<input type="checkbox"/> Long-Term Care Insurance
<input type="checkbox"/> Funeral Insurance	<input type="checkbox"/> Disability Insurance	<input type="checkbox"/> Disaster Insurance
<input type="checkbox"/> Other Insurance Policies (Example: Umbrella, Personal Articles):		

HOUSEHOLD UTILITIES

Have a recent account statement for each utility or service as well as contact info if applicable.

<input type="checkbox"/> Electricity/Gas/Oil	<input type="checkbox"/> Phone/Cable/Internet
<input type="checkbox"/> Garbage	<input type="checkbox"/> Cleaning Service/ Landscaping
<input type="checkbox"/> Home Automation	<input type="checkbox"/> Exterminator/Plumber/ Electrician
<input type="checkbox"/> Other (Example: Decorator, Pool Cleaner...):	

DIGITAL ACCOUNTS / SERVICES

Be prepared to identify all of the following digital accounts and services you use (username/password).

<input type="checkbox"/> Email	<input type="checkbox"/> Social Media
<input type="checkbox"/> Shopping	<input type="checkbox"/> Entertainment (Video / Music / Gaming)
<input type="checkbox"/> Health / Medical (medication)	<input type="checkbox"/> Money Management
<input type="checkbox"/> Cloud Storage (Photos, Documents)	<input type="checkbox"/> Travel / Food / Delivery
<input type="checkbox"/> Password Manager	<input type="checkbox"/> Unlock Codes: Cell Phone/Computer/Tablet
<input type="checkbox"/> Home Wi-Fi/Router	<input type="checkbox"/> Other (Example: Photography, Productivity...):

MISCELLANEOUS IMPORTANT INFO

Dependents (Children, Special Needs) Magazine/Newspaper Subscriptions
 Pets (Vet, Diet, Guardian, Insurance) Collectibles (coins, stamps, memorabilia)
 Other:

LEGACY / AFTER I'M GONE

Things you should think about even if you haven't done any planning yet.

Decide among: Burial | Cremation | Donation
 Funeral / Memorial Preferences
 Contracts / Prepaid Arrangements (Example: cemetery plot information)
 Obituary Preferences and info, which typically includes the following:

- Date/place of birth: _____
- Date/place of marriage: _____
- Parent's names: _____
- Education (schools/degrees): _____
- Military/Public service: _____
- Employment (titles, awards, achievements): _____
- Organization affiliations (religious, cultural, civic):

- Special accomplishments: _____
- Hobbies and Interests: _____

Letters For Family/Friends (list names of people you want to write a personal letter)

NOTES & PERSONAL THOUGHTS

Use this section for any important information, personal thoughts, or anything we may have missed. Remember, you can do this all online. Create an Everplan so this info, along with much more, is neatly organized, securely stored, and easy to share with the people you care about most.

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